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Foreign Crops and MARKETS

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EXPORTS ONLY A MEANS TO AN END

Export we must and will, after the war. But exports are not, as some people tend to think, an aim in themselves. They are a means to an end - that is to enable us to import the things which we need. To say, as some people do, that we must import certain things whether we need them or not, in order that we may export, is nonsense. To say that we must export to get the essentials we require is sound common sense. For a time, at any rate, the resources put at our command by our exports are unlikely to cover everything we require. For a time, therefore, we shall be compelled to cut down on things other than necessities. We want both food and raw materials. But many of the raw materials we most require we cannot produce here at home, whereas the farmers and farm workers in this country have shown that much of the food we need can be grown here. If, therefore, we must economize, it seems only sensible to do so on imports of food rather than on imports of raw materials.

R.S. Hudson, British Minister of Agriculture

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CANADIAN DAIRY PRODUCTION CONTINUES TO INCREASE

Total milk production in Canada in 1944 is now estimated at 17.6 billion pounds. This output is slightly above that in 1943, and the increase is a continuation of the upward trend that has existed for 10 years. Feed and pasture conditions in Canada were favorable for dairy production during the fall, and dairy herds entered the winter in good condition. Numbers of dairy cows during the fall were reported to be approximately one percent above a year earlier, but the percentage milked was down slightly. An increase in the proportion to calve in early spring is expected, however, especially in the Provinces of Quebec and Ontario. This anticipated increase in cows to be milked, together with abundant feed supplies, is expected to result in a milk output this year 3 percent above that of 1944.

The 1944 production year was marked by a drought during the summer months in eastern Canada that reduced the milk flow at that time below the levels of 1943. In September and October, however, pastures recuperated, and milk production for the Dominion as a whole in October, November, and December again exceeded the output in the corresponding months of 1943.

Milk-cow numbers in Canada are expected to be at record levels in 1945. The number on farms June 1, 1944, totaled 3,929,600, as compared with 3,794,700 a year earlier. During the same period, the number of dairy heifers increased from 983,300 to 1,047,500 head, a gain of 6.5 percent. The expected increase in cow numbers in 1945 will continue the upward trend begun in 1942. Previously, June 1 milk-cow numbers had reached a peak of 3,940,400 in 1937, followed by a decline to a low of 3,587,700 head in 1941.

CANADA: Milk cows and heifers and total milk production, 1937-1944

YEAR	JUNE 1 NUMBERS		TOTAL MILK
	MILK COWS	HEIFERS	PRODUCTION
	1,000 head	*1,000 head*	*Million pounds*
1937	3,940.4	915.0	15,447
1938	3,873.8	897.1	16,134
1939	3,873.5	926.1	16,146
1940	3,894.7	885.5	16,283
1941	3,587.7	895.3	16,753
1942	3,680.5	928.0	17,488
1943	3,794.7	983.3	17,517
1944	3,929.6	1,047.5	a/17,600

Official sources. a/Preliminary.

While still above average, the percentage of cows being milked in recent months has been below that of a year earlier. This tends to support other reports that there are more cows in calf that will be coming into production in 1945 to swell the milk output. Anticipated increases in freshening and in milk output are expected in the Eastern Provinces, but some decline is probable in the Prairie Provinces.

The average daily milk production per cow picked up rapidly during the fall months, following a below-average rate during the summer months. Currently, production per cow is somewhat above the rate of production a year ago and is appreciably above the average of previous years. Generous feed supplies will permit feeding that will tend to maintain or increase the rate of milk production.

Other factors affecting dairy production are still subject to war influences but as a whole are not expected to prevent some increase in milk output in 1945. Machinery and fertilizers are expected to continue in tight supply, but the experience gained thus far in adjusting to these conditions of shortages will tend to prevent them from limiting production. Little relief is in sight for the critical farm-labor situation, as but few workers are expected to return to the farms. Considerable slowing up is expected, however, in the drain of workers from the farms to war industries and other users of manpower.

The 1944 output of all manufactured dairy products combined showed a moderate increase over 1943. The greatest increase in production was in cheese, followed by more moderate increases in condensed whole milk and evaporated and dried skim milk. Creamery-butter production declined moderately, as greater quantities of milk were directed to production of cheese and condensed milk.

Only in the months of May, November, and December, 1944, did production of creamery butter reach the levels of 1943. A large share of the decline in total output occurred in the Prairie Provinces, where there was a drop in milk production per cow and in percentage of cows milked. The decline in this region continued through to the end of the year. Total output of creamery butter for the year would have been still smaller had it not been for the closing in October and November of some of the cheese factories in the Central Provinces, which resulted in diverting more milk to the production of butter. In addition to the 298 million pounds of creamery butter produced in 1944, about 55 million pounds of dairy and whey butter were made.

CANADA: Dairy products manufactured, 1944 with comparisons

YEAR	CREAMERY BUTTER	CHEDDAR CHEESE	ICE CREAM	CONCENTRATED MILK a/ PRODUCTS
	1,000 pounds	*1,000 pounds*	*1,000 gallons*	*1,000 pounds*
Average 1937-1941	266,252	133,438	9,436	178,099
1942	284,591	206,935	15,226	260,427
1943	311,709	165,528	17,175	255,225
1944 b/	298,097	176,614	17,697	276,205

Official sources.
a/ Includes whole-milk products and milk byproducts. b/ Preliminary.

The Dominion Department of Agriculture has announced its dairy-products program for 1945. This program anticipates an increase of 3 percent in total milk production and suggests that the increase in output available for manufacturing be directed entirely to butter production and that the production of other manufactured products be held at the 1944 level except in the case of condensed whole milk for which a small reduction is recommended. The quantity of milk going into fluid consumption is expected to continue its upward trend.

CANADA: Dairy products program for 1945

DAIRY PRODUCTS	PRODUCTION 1944 a/	PROGRAM 1945	CHANGE
	Million pounds	*Million pounds*	*Percent*
Milk (total)	17,600.0	18,100.0	103
Creamery butter ...	296.5	310.0	105
Cheddar cheese	177.0	177.0	100
Evaporated whole milk	175.0	175.0	100
Condensed whole milk	32.0	30.0	94
Whole-milk powder .	17.0	17.0	100
Skim-milk powder ..	27.5	27.5	100

Official sources.
a/ Preliminary. Creamery butter output now placed at 298.1 million pounds.

The plan to increase butter production no doubt arises from the present tight butter supply situation in Canada. Production has not been keeping pace with the demand, and the weekly ration has been reduced from 8 to 6 ounces.

Floyd E. Davis

INCREASED INTEREST IN COPRA PRODUCTION IN LATIN AMERICA DURING WAR YEARS

On the basis of available information, it appears that copra production in Latin America is currently averaging about 65,000 to 70,000 short tons yearly. This constitutes an increase of some 20,000 tons over the production level of 1939. In comparison with the large quantities of this commodity produced in the Southwest Pacific, the total production in Latin America is insignificant. Also, when compared with the greatly increased production of other oilseeds in Latin America, such as sunflower and flaxseed, the relatively small increase in copra production does not appear to be of much consequence. Yet, the increased production of copra over the past 4 years has been substantial enough to be of aid to domestic manufacturers, especially in providing an oil of high lauric-acid content. The increase has come about less through the efforts of the various governments to foster production than by the stimulation given the industry by favorable prices and rising demand, because former suppliers of copra were cut off as a result of the war.

Despite the fact that the tropical countries of the Western Hemisphere have thousands of acres of bearing coconut palms along their coast lines, the copra industry has not been particularly well developed. In most countries domestic production has been limited and has failed to keep pace with the expanding requirements by industry for coconut oil for soap and for edible purposes. The bulk of the coconuts harvested yearly has been consumed locally in the fresh state as food or exported. As a consequence, many of the Latin American countries imported a significant portion of their copra requirements from the producing islands of the Southwest Pacific. Thus, when supplies from that area were cut off because of war, the Latin American countries through necessity began to utilize domestically produced copra in increasing quantities. Also, as supplies of certain of the basic foodstuffs became short and prices rose, there was greater consumption of fresh coconuts for food. It should be mentioned, however, that the importance of coconuts as a staple food item has never been as great in Latin America as in some of the producing islands of the Southwest Pacific.

In order to control supplies of domestically produced copra and coconut oil and make them available for local use, during the past 3 years a number of export restrictions have been established. Usually they have consisted of an absolute ban on exports or a raising of export duties to such an extent that export was not financially possible. Another control has been through a system of export permits, which are issued only when sufficient stocks are on hand to cover domestic requirements.

Trade in copra and coconut oil between the various Latin American countries during pre-war years was very limited and for the most part in quantities of less than 500 tons. The inter-country trade has not followed any marked trend, movements for the most part being sporadic in nature. The islands of Trinidad and Tobago, the Republics of Paraguay and Honduras, and British Honduras have been among the principal exporters of these commodities.

While copra and coconut-oil exports from the Latin American countries have been limited, these countries have been the leading source of supply of fresh coconuts to the United States. During the 5-year period 1935-1939, the average number of coconuts imported by the United States annually totaled 42 million. During that period, however, imports of coconuts showed a marked downward trend, with 56 million being imported in 1935 and only 28 million in 1939. Imports continued to decline through 1942, when only 16 million coconuts arrived in the United States. In 1943, however, when shipping facilities became more available, imports jumped to 43 million coconuts.

The most important supplier of coconuts has been Jamaica which shipped an average of 20 million yearly for the period 1935-1939. Other countries exporting coconuts in volume to the United States during pre-war years were Panama, with an average of 7 million annually, Honduras with 6 million, British Honduras with 4 million, and Trinidad and Tobago with 1.6 million. Since 1939 Jamaica has continued to be the leading shipper, with Honduras in second position. During the past 2 years Mexico has come into the picture by shipping significant numbers.

Wild coconut palms flourish on the coastal plains of most of the Latin American countries. On the eastern coast they extend from the State of Veracruz in Mexico all the way around the northern edge of South America down through the State of Bahia in Brazil. From the western State of Nayarit in Mexico they are found bordering the Pacific Ocean south to Ecuador. Coconut palms dot the numerous islands of the Caribbean Sea and appear in great numbers in the Lesser Antilles, especially on Trinidad and Tobago.

Relatively few cultivated plantations of coconuts are found in Latin America, most of the coconuts being harvested from wild trees. In comparison with other producing regions, the yield of coconuts in Latin America is low, averaging probably no more than 30 coconuts per tree annually. Better yields are obtained from trees in Trinidad and Jamaica, where more modern methods of cultivation are employed. It is reported that in parts of Brazil yields as high as 60 to 70 coconuts per year are not uncommon. Bud rot, scale insects, and nematodes have caused considerable trouble in the Caribbean area.

The Republic of Mexico is the most important producer of copra in the Western Hemisphere. Production has increased from 18,500 tons in 1939 to an estimated 34,000 tons in 1944. The most important producing States are Guerrero and Colima on the Pacific Coast and Campeche, Tobasco, and the Territory of Quintana Roo on the eastern coast. It is expected that copra production in Mexico will continue to increase slowly for a number of years to come. Agrarian legislation and certain State taxes have been deterring factors in the past decade. In addition to being the largest producer, Mexico is also the largest Latin American importer of copra and coconut oil. For the 5-year period 1935-1939, annual imports averaged 46,000 tons. In 1941 Mexican soap manufacturers imported the largest amount of copra on record; a total of 99,000 tons entered the Republic in that year.

The British West Indies islands of Trinidad and Tobago appear to constitute the second most-important copra-producing area. It is estimated that about 11,000 to 12,000 tons of copra are being produced annually on these islands at the present time. A period of drought in 1940 and 1941 caused some lowering of production, and since that time shortages of labor have hindered production somewhat. During the war years practically all the copra that was produced has been consumed locally.

Jamaica is another ranking producer of copra and has a current yearly production of some 8,000 to 9,000 tons. As mentioned previously, however, Jamaica is better known as a shipper of fresh coconuts. It is believed that about 90 million coconuts have been harvested annually during the past few years. The industry suffered a set back in August 1944 when a tropical hurricane seriously damaged coconut plantings; some reports indicate that 40 percent of the trees were damaged.

Panama, British Honduras, Honduras, and Nicaragua are the leading producers in Central America. Only small amounts of copra are produced in Guatemala, San Salvador, and Costa Rica.

It appears that Panama produced about 2,500 tons of copra in 1944. The construction of a vegetable-oil plant in 1938 helped to bring about a greater demand for domestic copra. The main centers of production are the Gulf of Montijo on the Pacific Ocean and the Bocas del Toro and San Blas sections on the Caribbean side of the Isthmus of Panama. During the early years of this century a number of coconut plantations were established. Subsequently, most of these were abandoned, but interest in them has been revived in the past 3 years. The San Blas area is the largest producing center. In 1941 a few dryers were constructed to permit drying of copra during the rainy season.

The Bay Islands lying off the Coast of Honduras are the center of production of that country. A smaller number of coconuts is produced in the region adjacent to La Ceiba. The industry has expanded greatly as a result of the war. Lack of water transportation in the early part of the war curtailed the activities somewhat. Prices have been favorable, and Honduras has shipped copra to the neighboring countries of Central America and Mexico. Some artificial drying is done during the rainy season, but most of the copra is sun dried.

Most of the Nicaraguan copra production, which has shown considerable increase since 1941, comes from the Corn Islands. On the mainland, coconuts are found growing in scattered locations along the 360-mile Caribbean Coast. The bulk of the coconut oil is used in the local soap industries in Granada, Managua, and Leon. The balance is used for cooking and in the manufacture of vegetable lard.

Copra production in Ecuador is estimated at 400 tons per year. The States of Esmeraldas and Manabi appear to be the centers of production at the present time. Some expansion in the coconut production has taken place in Colombia during the war years, but much of the coconut lands still remain undeveloped. The center of production is located around the small Island of San Andres, and a good portion of the copra is processed near Barranquilla.

The number of coconut trees in Brazil is variously estimated at from 5 to about

6 million. Very few of the coconuts are dried for copra, practically all of them being consumed for the milk and the meat. It appears that about 4 million trees exist in the States of Alagoaş, Parahyba, Sergipe, and Bahia. Brazil has exported a few hundred tons of copra to other South American countries, but shipments have been sporadic. Brazil has mostly concentrated its efforts in the production of other palm and palm-kernels oils, the most important of which are babassu and uricury.

Douglas M. Crawford

ITALIAN ALMOND PRODUCTION SLIGHTLY HIGHER THAN IN 1943

The 1944 preliminary estimate of shelled-almond production in Italy is 22,700 short tons, as compared with 21,400 tons in 1943 and 14,500 tons in 1942. The estimate shows a 15-percent decline in production from the 5-year (1938-1942) average of 26,800 tons, and 25 percent from the 10-year (1933-1942) average of 30,100 tons. The estimated production in Sicily is 11,700 tons, as compared with 12,400 tons in 1943 and 7,200 tons in 1942. In the Apulia-Abruzzi-Molisse production center (Bari) the estimate is 11,000 tons, as compared with 9,000 for the previous year and 7,300 tons in 1942.

ITALY: Estimated production of shelled almonds, 1944 with comparisons

YEAR	PRODUCTION	YEAR	PRODUCTION
	Short tons		*Short tons*
Average -		1938	44,000
1938-1942	26,800	1939	15,000
1933-1942	30,100	1940	28,600
1934	34,300	1941	31,900
1935	33,400	1942	14,500
1936	33,500	1943 a/ ..	21,400
1937	33,000	1944 a/ ..	22,700

Official sources. a/ Preliminary.

The growing conditions in the Apulia-Abruzzi-Molisse area were generally good throughout the season. There was ample moisture, and blossoming took place under satisfactory conditions. There is relatively little war damage to almond groves, though a few groves have been pulled out to make room for war installations of various types. The loss of acreage from this cause is more than made up by new plantings in the area north of Bari coming to bearing for the first time. New plantings of the better types of almonds have been heavy in this area in recent years.

In Sicily, war damage to almond groves was somewhat more severe, and considerable acfeages were lost in some Provinces. Growing conditions during the 1944 season were reasonably satisfactory, considering weather and war factors. There is comparatively little new acreage of almonds in Sicily.

The situation with regard to the labor supply in Italy at harvesttime was a bit abnormal. While ample labor was available, it was difficult in some sections to induce people to work in the almond groves. This was due in part to the higher wages being paid by military forces for certain types of laborers and in part to the increased cost of living, which made it necessary for laborers to seek more lucrative occupations.

Another difficulty experienced this season was the lack of transportation to haul the almonds from the groves to market. The Italian Army, the German, and finally the Allied Forces have requisitioned all available suitable trucks and draft animals during the past 4 years. This left the civilians only broken-down or much-worn trucks, most of them in need of tires and repairs, and only a very few good draft animals. Some attempts were made by the Italian and Allied authorities to remedy the situation, but at the best it was unsatisfactory.

The estimated carry-over from the 1943 crop was about 3,800 short tons (shelled basis) in Bari and some 12,000 tons in Sicily. These estimates are believed to be rather on the optimistic side, in view of the tremendous increase in domestic consumption. The shortage of other foods has caused many Italians to eat more almonds than before the war. Almonds are also being made into flour, which is mixed with wheat flour for bread. The Allied troops in Italy also consume almonds purchased from peddlers on street corners. The Sicilian carry-over is reported to be of such poor quality that it is unsuitable for export.

There is a strong reluctance on the part of growers and exporters to give any data on existing stocks. This is attributed to the fact that before the Allied occupation, prices had been fixed at 2,975 lire ($29.75) per bale of 220 pounds, shelled basis, and a compulsory amasso (collection by semi-Government agency) had been established. The amasso was looked upon unfavorably by growers and exporters as an unnecessary infringement on their rights. The prices fixed were not in line with increased costs all along the line and especially with black-market prices.

The almond marketing situation from the time of the Allied invasion of Sicily to the opening of the 1944-45 marketing season was definitely chaotic. German purchases via the compensation system were completely out, as were purchases by other European countries still under German control. This left virtually the entire crop, plus the carry-over from 1942, to be disposed of in the domestic market or to the Allies.

Soon after the Island of Sicily was freed of fighting, attempts were made by certain Allied Nations to export almonds. Results were rather unsatisfactory, because prices offered Italian exporters were too low, packing material was not available, domestic and overseas transportation was definitely short, and the shortage of food, especially flour, caused a diversion of almonds into domestic channels. The quality of the almonds was also inferior, and many were not suitable for export.

The Sicilian farmer was reluctant to part with his almonds for lire of a very doubtful purchasing value. He felt that, come what may, he could at least trade his almonds for other badly needed essentials of life, if they could be found, and at the same time hedge against the inflation which swept over the island as soon as it was liberated. In addition, speculators and other persons wishing to safeguard their funds, or to make a big profit, entered the picture. Attempts on the part of the Italian authorities to force delivery of almonds were rather unsuccessful and resulted in very few being made available for export.

The situation in Bari during the period September 1943 to September 1944 was almost identical to that in Sicily, except that almonds rose on the black market to 6,000 lire a bale ($60.00 per 220 pounds) and higher for any type of shelled whole nuts. The pre-war grades and standards were practically ignored. Black-market operators from Naples bought shelled nuts in Bari at the above prices, then managed to get them to Naples, where they were sold for around $160 to $180 per bale of 220 pounds. The Italian Government tried vainly to keep the prices down to 2,975 lire ($29.75) and to requisition almonds.

The trade in both producing areas was badly disorganized. Many of the exporters in Sicily were completely out of the business and had left Sicily prior to the arrival of Allied forces. In Bari most of the old pre-war concerns were still open for business but were unable to obtain nuts at legal prices. An attempt was made by certain Allied countries to buy 1943-crop nuts, but the terms and prices offered were out of line in view of existing circumstances.

The 1944-45 marketing season faces conditions only slightly better than those of the preceding one. The food situation shows little improvement, transportation has deteriorated even further in some categories, packing materials have become almost nonexistent, and the difference between the ideas of prices of buyer and seller has continued to widen. Certain of the United Nations again have shown considerable interest, but again at prices far too low to bring out the crop. The situation at this time seems to indicate that at the best only a very small proportion of the production will find its way to foreign markets, and that the shortage of food will take care of the crop.

In view of the generally uncertain conditions, prospective purchasers are urged to pay particular attention to the standing and reputation of the exporters with whom they intend to deal, and to be sure of the grade and quality of the nuts. Arrangements most likely will have to be made to supply packaging materials for anything but small lots. Moreover, shipping continues in tight supply.

The situation with regard to other Italian nuts is practically the same as that for almonds. (See article on filberts, Foreign Crops and Markets, December 26, 1944.)

UNITED STATES: Imports of shelled almonds, September-December 1943, with comparisons

YEAR	TOTAL IMPORTS	YEAR	TOTAL IMPORTS
	Short tons		*Short tons*
Average -		1939-40	652
1938-39 to		1940-41	1,290
1942-43 ..	973	1941-42	1,543
1933-34 to		1942-43	616
1942-43 ..	1,989	1943-44 a/ ..	1,059

Compiled from official sources.
a/September-December 1943, only.

W. R. Schreiber

LATE COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

CANADIAN GRAIN-CROP VALUE AT RECORD LEVEL

The gross value of the total grain crop produced in Canada during 1944 is estimated at around $941,000,000 in Canadian currency, according to a report of the Dominion Bureau of Statistics at Ottawa. The value of the 1944 grains would, at that figure, be the highest reported, surpassing the former record values of 1942 and 1943 by $121,000,000 and $215,000,000 respectively.

The high value was attributed to generally better-than-average harvests, combined with higher prices. The bulk of the increase occurred in wheat. The gross value of wheat, at $477,119,000, constituted more than a third of the estimated total of all field crops in 1944. That figure is about 65 percent higher than the 1943 value, now estimated at $287,847,000, and almost 25 percent larger than the $385,475,000 for 1942. The wheat increase, compared with 1943, was larger than the total gains in all other crops combined.

On a Provincial basis, the largest increase was in the important grain-producing Province of Saskatchewan, where the wheat crop is especially significant. The value of all grains increased in that Province by $123,000,000 compared with the 1943 value. The eastern Province of Ontario contributed the next greatest increase, the gain being estimated at about $44,000,000. The improvement was due to the greatly increased outturns of all grains as the result of more favorable weather conditions than in 1943.

A gain of $37,000,000 in the value of grains in Alberta was attributed entirely to the enhanced value of wheat, most other grains showing a slight reduction compared with 1943. The slightly increased value of the grain crop in Manitoba was also due to the increase in wheat.

TANGANYIKA GUARANTEES MINIMUM RETURNS FOR GRAIN CROPS

Minimum returns to non-native producers of grains in Tanganyika, for the season ending August 31, 1945, have been announced. Government control measures provide that growers instructed to plant specified crops during the current crop year are guaranteed a minimum return per acre.

The minimum returns for wheat are set at 45 East African shillings per acre (about $9.10 in United States currency). A minimum return of 40 shillings ($8.09) is guaranteed for both corn and kaffir. The guaranties are understood to be insurance against loss rather than assistance toward higher prices, in connection with the Government's announced program for increased food crops.

The 1944 wheat crop was reported at 380,000 bushels and corn at 1,330,000 bushels.

REDUCED WHEAT CROP EXPECTED IN NEW ZEALAND

New Zealand's wheat acreage, now being harvested, is reported at 184,000 acres, according to the latest available information. An estimated 187,000 acres were seeded. At this figure the acreage, which would be the smallest reported since 1925, is considerably below the year's goal of 300,000 acres and the 1943-44 harvested area of 235,000 acres.

No official estimate of production is available, but early season forecasts, based on average yields, indicate a production of around 5.5 million bushels. A crop of that size would be somewhat below average and compares with the 1943-44 harvest of 7.2 million bushels and the preceding outturn of 9.8 million bushels. With the production at the expected level, increased imports would be required to make up the deficit. Requirements, which during 1937-1941 were placed at an average of about 9.8 million bushels, appear to have increased to around 11.5 million bushels in recent years.

NEW ZEALAND: Wheat acreage, production, and apparent consumption, 1944 with comparisons

YEAR	ACREAGE HARVESTED	PRODUCTION	IMPORTS a/	APPARENT CONSUMPTION
	1,000 acres	*1,000 bushels*	*1,000 bushels*	*1,000 bushels*
Average 1937-1941	227	7,319	2,436	9,755
1942	287	9,819	2,079	11,898
1943	235	7,208	-	-
1944	184	b/5,500	-	-

From official and unofficial sources.
a/ Imports for calendar year following production.
b/ Indicated production.

VEGETABLE OILS AND OILSEEDS

INDIAN OILSEED MARKET ACTIVE

The most important developments in the Indian oilseed market during the quarter ended September 30, 1944, were the large purchases of peanuts made by the British Ministry of Food and the successive reductions in its buying rate after each purchase. With export demand fair, low stocks of peanuts, and trade circles expecting a reduction in the acreage devoted to oilseeds due to the Government's "grow more food" campaign, the Bombay market was active during July and August. In September, however, the market was quiet and prices of oilseeds and oil, except linseed oil and coconut oil, declined. The British Ministry of Food purchased approximately 275,000 long tons of peanuts at prices ranging from $137 per long ton in July to $124 at the end of September.

COTTON AND OTHER FIBERS

WEEKLY COTTON PRICES ON FOREIGN MARKETS

The following table shows certain cotton price quotations on foreign markets, converted at currant rates of exchange.

COTTON: Price of certain foreign growths and qualities in specified markets

MARKET LOCATION, KIND, AND QUALITY	DATE	PRICE PER POUND
		Cents
Alexandria (Spot)		
Ashmouni, F.G.F.	1-4	29.23
Giza 7, F.G.F.	1-4	32.15
Karnak, F.G.F.	1-4	31.94
Bombay (March futures)		
Jarila	1-6	17.29
Bombay (spot)		
Kampala East African	1-6	36.31
Buenos Aires (spot)		
Type B	12-23	14.72
Lima (spot)		
Tanguis, Type 5	1-8	15.47
Recife (spot)		
Mata, Type 5	1-5	12.51
Sertão, Type 5	1-5	13.50
São Paulo (spot)		
São Paulo, Type 5	1-5	14.24
Torreon (spot)		
Middling, 15/16"	1-6	18.09

Compiled from weekly cables from representatives abroad.

INDIAN COTTON ACREAGE LOWER THAN LAST YEAR

The second official cotton report for India, just released, places the 1944-45 area planted at 12,957,000 acres against 14,701,000 acres for the corresponding date in 1943. The second estimate is usually released late in October, showing area planted to date, and during the past 10 years this estimate has averaged 83.4 percent of the final estimate.

DOMESTIC FIBER PRODUCTION INCREASES IN BRAZILIAN STATE OF PARÁ

More than 6,000,000 pounds of malvaceous fibers were produced during 1943 in the Brazilian State of Pará for consumption by jute mills in the manufacture of burlap bags and cloth. Annual production in this State prior to 1939 did not exceed 750,000 to 800,000 pounds. Practically all of the crop was used by the sack and cordage mill at Belém for mixture with jute in the manufacture of bags. Pará now produces a sufficient supply for the Belém mill and a surplus of more than 5,200,000 pounds for shipment to mills in other parts of the country.

Domestically produced fibers for burlap and bags have been exploited in increasing amounts throughout all of Brazil since war conditions reduced importation of jute and jute products from India. Brazilian jute mills in 1942 consumed 33,570,000 pounds of domestically grown fibers and 33,980,000 pounds of imported fibers. Of the domestic fibers, more than 15,000,000 pounds, or 45 percent, were malvaceous varieties, which are known in various localities by such common names as malva roxa, uacima, guaxima, aramina, issima, carrapicho, and many others. The other 55 percent of these domestic fibers included 33 percent of caróa, 11 percent of jute, 7 percent of Papoula de São Francisco, and the remaining 4 percent of various miscellaneous fibers. Grading specifications have been set up for types 1, 3, 5, 7, and 9, as for jute. Close to 50 percent of the fibers classified has fallen in Type 5, and about 25 percent in Type 7.

TOBACCO

TURKEY'S TOBACCO PRODUCTION MAINTAINED; QUALITY LOWER

Unofficial estimates place the 1944 output of leaf tobacco in Turkey at between 117 and 132 million pounds, as compared with the 1943 production of about 123 million pounds. Drought conditions during the 1944 growing season are reported to have had adverse effects upon the quality of the leaf, particularly in the Aegean region, and, in general, quality was lower than in 1943. The 1944 crop, as reported unofficially, would provide an export surplus of between 74 and 89 million pounds. The portion of the 1944 crop grown in the Aegean region suitable for the American market is estimated at about 38 million pounds.

Old-crop leaf held by dealers in the Aegean region on October 1, 1944, for export to all destinations was estimated at 13 million pounds. Dealers' asking prices, however, were considered excessive, and buyers were not active. As of October 1, 1944, no date had been fixed for the opening of the Izmir market for new-crop leaf, but it was expected that it would be sometime in January 1945.

Exports of Turkish leaf to the United States during the first 6 months of 1944 were above the pre-war level, but exports to Germany declined during the period and ceased entirely upon severance of commercial relations with that country in the late summer of 1944. The Turkish Government is concerned over the loss of the German market for low-grade leaf. Exports of leaf from Turkey during the period 1936-1940 averaged 78 million pounds annually, of which nearly 40 percent was destined to Germany.

FRUITS, VEGETABLES, AND NUTS

IRANIAN ALMOND PRODUCTION LOWER

The 1944 preliminary estimate of Iranian almond production is 5,300 short tons, shelled basis, as compared with 7,000 tons in 1943 and 5,300 tons in 1942. The estimate shows a 31-percent decline from the 5-year (1938-1942) average of 7,700 tons. In addition to the shelled nuts, 1,300 tons will be disposed of in the shell.

IRAN: Estimated production of shelled almonds, 1944 with comparisons

YEAR	PRODUCTION	YEAR	PRODUCTION
	Short tons		*Short tons*
Average 1938-1942	7,700	1941	4,400
1938	11,000	1942	5,300
1939	8,800	1943 a/ ..	7,000
1940	8,800	1944 a/ ..	5,300

Official sources. a/ Preliminary.

The growing season was less satisfactory than that of 1943. January and February were rather dry and were followed by late spring frosts, which caused an abnormal drop of immature fruit. Harvesting took place under satisfactory conditions and the quality of the nuts was good.

Stocks remaining on hand when new-crop nuts came to market were reported as being very small. Indications were that they would be utilized in the domestic trade. In this connection, domestic consumption, which in pre-war years equaled only about 12 percent of production, now is said to be nearer 50 percent. The increase in domestic consumption is largely due to the lack of suitable foreign export outlets.

Exports during 1943-44 were almost exclusively to India, Soviet Union, Iraq, Palestine, and other Near East countries. A few small lots were exported to the United States. The available export data indicate that between August 23, 1943, and March 22 1944, a total of 1,954 tons of shelled and 522 tons of unshelled almonds had been exported to destinations shown above.

The marketing of the 1944 crop started off in the same general pattern as that of the previous year, with exports to the same destinations. Prices declined in September to 18 to 21 rials per kilogram (25.6 to 28.5 cents per pound) for shelled nuts in the domestic market. Exporters were not making c.i.f. New York quotations at that time, because of the improbability that shipping space would be available. The quotations f.a.s. Iranian port were between $700 and $750 per 2,200 pounds of shelled, depending on grade, quality, etc.

LIVESTOCK AND ANIMAL PRODUCTS

DANISH HOG NUMBERS SMALLER AT BEGINNING OF NEW SEASON

Danish hog numbers were smaller at the beginning of the new marketing season. The number reported on November 8, 1944, was only 1,989,000, compared with 2,449,000 on the corresponding date of 1943. The number reported in November 1939 was 3,230,000 head.

As a result of good feed crops in 1942 and 1943, hogs increased from the wartime low point of 1,141,000 head to which they had fallen in June 1942 to 2,449,000 in November 1943. Since that time they have declined materially, but are still 19 percent above those reported on the corresponding date of 1942.

RANGE CONDITIONS UNFAVORABLE IN NORTHERN MEXICO

Cattle ranges in the State of Chihuhua, Mexico, are reported to be in very poor condition, because of lack of adequate rainfall last summer and fall and indications of overstocking. Much supplementary feeding probably will be necessary this winter to prevent heavy losses before spring. Since local production of cottonseed, oats, and alfalfa is much below normal, cattlemen are finding it difficult to obtain needed feed supplies. The strong demand for cottonseed cake in the United States tends to draw off part of the Mexican production, thus further reducing supplies of this product for local use.

Water holes in most parts of Chihuahua are getting low, and unless heavy winter rains occur the water shortage may become acute by early spring. Because of war conditions, ranchmen are still unable to obtain needed equipment, such as windmills, pumps, and fencing material, which would enable them to operate more effectively and efficiently.

Exports of cattle from the State of Chihuahua to the United States during the first 11 months of 1944 totaled 149,000 head, or 82,000 less than the record number exported a year earlier. Most recent figures indicate that the total from all of Mexico in 1944 probably did not exceed 350,000 head as compared with the yearly quota of 500,000, which was about the number exported in 1943. Although the quota allotted to Chihuahua in 1944 was reduced 25 percent, the number actually exported from that State was about 70,000 head below the quota.

Several factors apparently contributed to the reduction in Mexican cattle exports in 1944 from the very high level reached in 1943. The large 1943 total reflected the lowering of import duties in the United States early in the year and the consequent economic advantage of shipping cattle from Mexico to the United States.

By 1944 these economic advantages were less marked because of price adjustments in both countries that tended to reduce the differentials. Furthermore, demand in the United States tended to shift from calves, which Mexico normally exports in largest numbers, to older and heavier cattle, because of the desire of finishers there to shorten the feeding period and reduce operating risks in view of the uncertainties as to when the war would end. Ranchmen in Mexico found their home markets more favorable for cattle suitable for immediate slaughter and in view of their heavy export sales in 1943 were in a position to make some readjustments in their operations in 1944, when export demand was less active.

Cattlemen in Chihuahua last year agreed to supply 12,000 head of cattle yearly for slaughter in Mexico City and despite transportation difficulties had shipped about 7,000 head to that market by early December.

REGINALD ROYSTON
DIV OF AGR'L STATISTICS B A E
7-11-43 U S DEPT OF AGRICULTURE
F CR C WASHINGTON 25 D C